

COPIC Financial Service Group improves lives by making sure physicians, dentists, and other members of the health care community are adequately insured and prepared to transition comfortably throughout all stages of life and career. As an independent insurance brokerage and consulting firm, COPIC Financial works with a variety of top carriers and partner companies to provide the best products and services based on your individual needs.

## BACKGROUND

COPIC Financial started doing business in 1985 and has grown over the years to build a strong and reliable team, expand its scope of services, and establish itself as a trusted partner known for its commitment to customers.

## PARTNERSHIP

COPIC Financial is pleased to have been named an endorsed company by the Colorado Dental Association for the business and personal insurance needs of its members, and a Member Benefit Partner of the Colorado Medical Society.

## INSURANCE PRODUCTS

- Life insurance
- Disability insurance—group and individual disability income, disability overhead expense, and key person.
- Health insurance—group and individual.
- Dental and vision insurance
- Property and casualty insurance—cyber/data breach liability, bonds, business owner's package, errors and omissions liability, directors and officers liability, employment practices liability, personal lines (home and auto), umbrella and excess liability, and workers' compensation.
- Long-term care insurance

## BENEFITS & FINANCIAL PLANNING SERVICES

- Employee benefits—benefit planning, group short- and long-term disability income insurance, group life insurance, group health insurance, group dental insurance, long-term care insurance, qualified retirement plans, and vision insurance.
- Investment planning
- Qualified retirement plans



EXPERTISE TO HELP YOU **NAVIGATE** THROUGH COMPLEX DECISIONS AND  
**FIND THE RIGHT SOLUTIONS.**



## APPROACH

- Customers can count on receiving objective advice and recommendations based on research and performance because COPIC Financial specialists are not directly tied to any insurance or investment company. Instead, they provide advice based solely on customer needs.
- Medical and dental professionals have unique financial challenges that require specific knowledge and experience. Customers can be assured their needs will be fully addressed by COPIC Financial's staff, who have years of proven expertise in their respective disciplines and provide unparalleled insight to determine the best solutions.
- COPIC Financial's account executives have one priority—finding the best products and services in the market to ensure appropriate coverage and save customers time and money.



## CUSTOMER SATISFACTION

In the most recent customer satisfaction survey, more than 90 percent of customers said COPIC Financial was “able to provide me with the information I needed in a prompt and professional manner” or “the individual I spoke with was very knowledgeable.”



Better Medicine • Better Lives

**COPIC Financial  
Service Group, Ltd.**

*COPIC Financial Service Group, Ltd. is an insurance brokerage firm representing a variety of insurance carriers. Products offered by COPIC Financial are not issued by COPIC Insurance Company.*

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